HealthShare Referral Manager Clinical Viewer Quick Reference Guide

Community Care Referral and Authorization | August 2023

HealthShare Referral Manager

HealthShare Referral Manager (HSRM) is an electronic referral and authorization processing system used by the Department of Veterans Affairs (VA) to accelerate Veterans' access to community care. HSRM allows VA, third-party administrators (TPAs), and community providers to better manage community care referrals and authorizations. HSRM facilitates a reduction in turnaround time for processing referrals, providing care, submitting claims, and receiving payment. This quick reference guide (QRG) is one of several guides that will help users get the most out of HSRM.

Quick Reference Guide Topics

- » Clinical Viewer and HSRM
- » Locate a Referral
- » Using Clinical Viewer
- » Help with HSRM

Clinical Viewer and HSRM

The Clinical Viewer portal offers users a comprehensive view of a Veteran's medical documentation history in HSRM. Categories of information available in Clinical Viewer include clinical summaries of the patient's history, allergies, immunizations, medications, lab results, procedures, and more. HSRM uses the Veterans Data Integration and Federation Enterprise Platform (VDIF-EP) to gather and consolidate patient history information. The information is filtered into relevant categories in Clinical Viewer. This gives HSRM users a secure, centralized source for the medical history and patient details of a Veteran in HSRM.

> » *Note: The following security groups do not have access to Clinical Viewer: VA View Only, VA Reporting Only, VA Print Only, Community Care Network (CCN) 1 – 6, Community View Only, TriWest, VA Claims Adjudication and Reimbursement (CAR) Staff, and VA CAR Supervisor.*

Locate a Referral

HSRM allows users to locate referrals quickly and manage them according to their priority. When logging in to HSRM, the Referral List screen—which is also the home screen—appears. Users can treat the Referral List as a to-do list, as it shows all of the referrals from VA in a central location. Users can locate a specific referral using the Referral List.

The Referral List contains a sorting feature that allows users to quickly organize referrals based on a variety of criteria.

To locate a referral using the Referral List:

1. Select the **Menu** icon ☰ at the top left of the screen.
2. Select **Referral List** from the drop-down menu to navigate to the **Referral List** screen.
3. Locate the referral by sorting the list (e.g., Last Name, First Name), or by using the **Find Referrals** or **Find Referral by Patient** search features, both of which are available by selecting the **Menu** icon ☰ on any screen in HSRM.
4. Select the row of the referral to view the referral details.
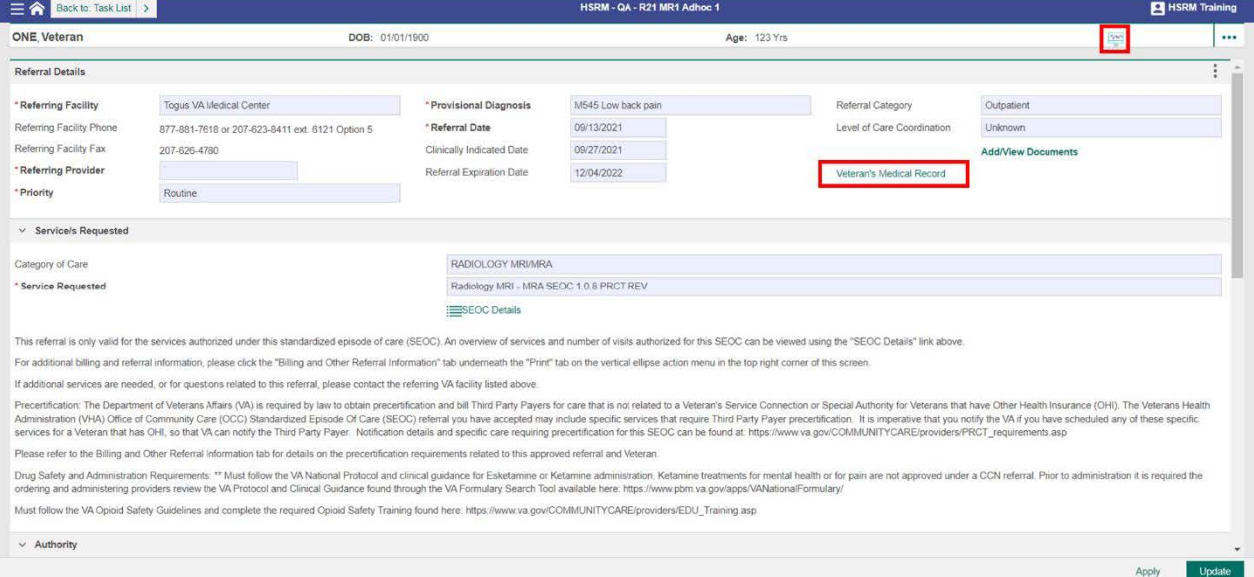
Using Clinical Viewer

Clinical Viewer is accessible from the Referral Details screen for any Veteran that has relevant data in the system. The Clinical Viewer icon 〰 will be available on the Patient Banner to access patient data.

To access Clinical Viewer:

1. Locate the Veteran's referral (see the **Locate a Referral** section of this guide).
2. Select the **Clinical Viewer** icon 〰 on the Patient Banner or select the **Veteran's Medical Record** link on the **Referral Details** screen.

Exhibit 1: Referral Details Screen

3. If the user selects the Clinical Viewer icon, a menu on the right side of the screen will open. Select the Veteran's Medical Record option. Alternatively, if the user instead selects the **Veteran's Medical Record** link in the **Referral Details** section of the screen, it will bypass the menu in **Exhibit 2** and take user directly to Clinical Viewer.

Exhibit 2: Clinical Viewer Access Menu

4. The **Clinical Summary** page will open, displaying an overview of the patient's medical history in HSRM. This is the home screen for Clinical Viewer. Specific categories of information available for viewing are in a list called the **Chartbook**, as shown in **Exhibit 3**. Select one of the categories in the Chartbook to view it.

Exhibit 3: Clinical Viewer Home Screen

» *Note: All information in Clinical Viewer is read-only, so users will not be able to print or download any information or documentation. Attempting to save images or data from Clinical Viewer may present security risks. Users must remove any saved data or images from their device after use.*

The user group that employs HSRM to directly access Clinical Viewer is known as **HealthShare (HS) Clinical Viewer**. Upon logging in to HSRM, they will see a **Patient Find** search that allows them to look up patients with a variety of criteria, including demographic and patient record information. After the user generates a search, a list of patients that meet the search criteria is displayed on the screen.

Exhibit 4: Patient Find Screen

On most Chartbook pages, the information available to the user will appear in a list. There are multiple ways to adjust the lists to find specific items, including using the sorting feature.

To sort a list in Clinical Viewer:
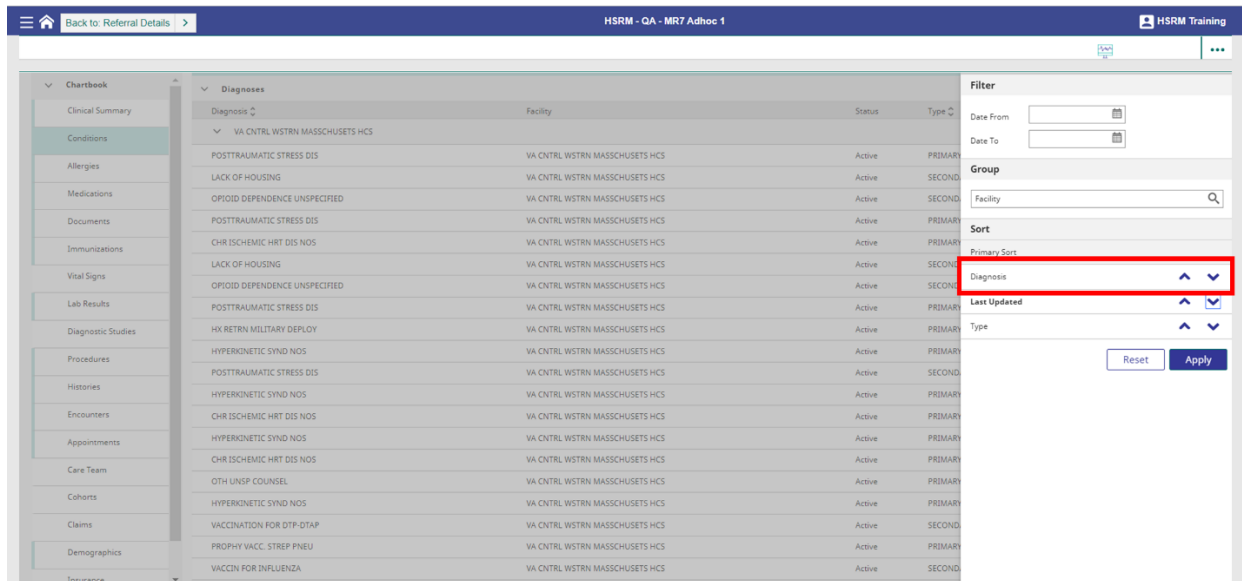
1. Select the **Sort** icon at the top of the list.

Exhibit 5: Sorting a List

2. Select the **Ascending** ^ or **Descending** ˅ options to sort the information by any available category. Users can also use the **Secondary Sort** option (if applicable) to sort the data in each category if multiple sorting options are available.

Exhibit 6: Sorting Options

3. Select the **Apply** button [Apply]. The list will sort according to the chosen criteria.

In addition to sorting a list, users can filter by **Date From** and **Date To** for results within a specific time period.

To filter by date:

1. Select the **Sort** icon [icon] at the top of the list.
2. Populate the **Date From** and **Date To** fields and select the **Apply** button [Apply]. The list will only display results within that specific time frame.

Exhibit 7: Filter by Date

Users can also group the lists by certain available criteria.

To group a list in Clinical Viewer:

1. Select the **Sort** icon ![icon] at the top of the list.
2. Select the **Group** field, choose a category to group the information, and select the **Apply** button ![Apply] .

Exhibit 8: Advanced Sort Menu – Group

3. The list is now grouped according to the chosen category.

Exhibit 9: Conditions Page Sorted by Diagnoses

Clinical Viewer also offers a search bar on select pages to filter lists and help locate specific information.

To use the search feature:

1. Enter the desired search criteria into the search bar and select the **Magnifying Glass** icon (also called lookup graphic by screen readers) or the **Enter** key on the keyboard.
2. The list will filter to only show entries that match the selected search criteria.
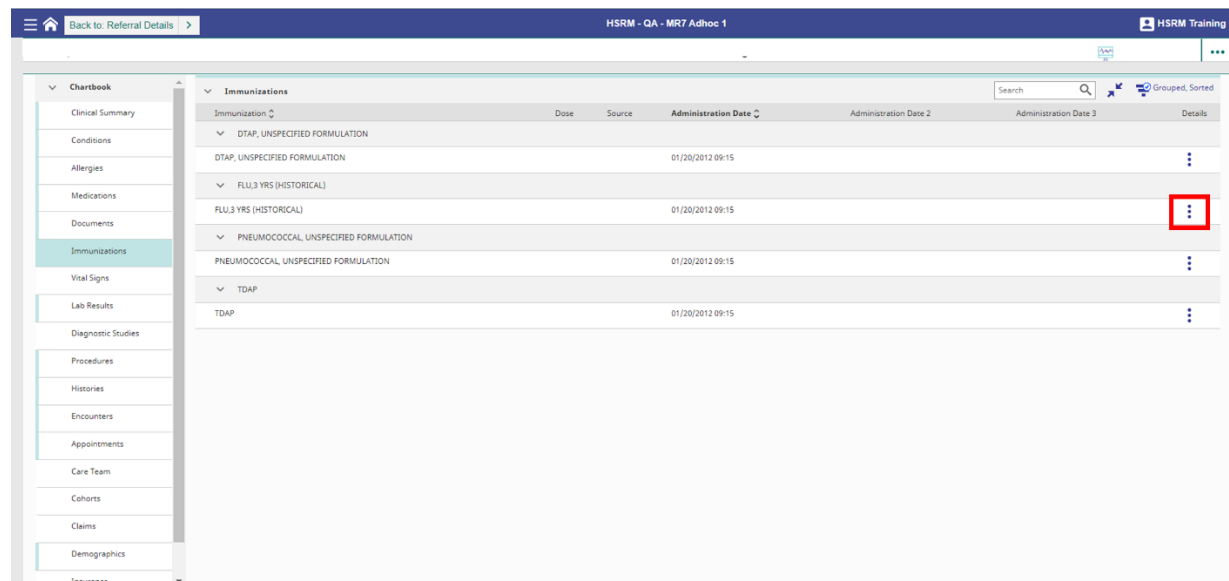
Exhibit 10: Search Bar

In addition to what displays on the screen that the user is searching, the search feature will also search within entries or records on each Chartbook list. If the user searches the word "appointment," for example, all results in that Chartbook category that include the word

"appointment" in their title will appear, as well as any records that may not have the word "appointment" in the title but include it in their details, documents, or specific information.

Users can view specific information about each data entry or record within a specific Chartbook category. Select the **Details** icon ⋮ on the row for the specific item on the list. This allows users to view documents, details, or more specific information pertinent to the respective record in Clinical Viewer.

Exhibit 11: Immunization Details

Help with HSRM

Community providers can request assistance with HSRM by contacting the HSRM Help Desk, opening a ticket by phone at (844) 293-2272 or by email at hsrmsupport@va.gov.

VA staff should contact the Enterprise Service Desk (ESD) for HSRM support. The ESD can be reached by phone at (855) 673-4357 or through the online self-service feature. Tickets should be routed to the **HSRM Tier 1** queue.